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FOREIGN AGRICULTURE

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The Wool Industry Today

Central American Meat Exports

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This week's cover:

As part of the International Wool Secretariat's nature-oriented carpet promotion "Surround," couturier Hubert de Givenchy created this design, which captures the motion of rippling water. For an up-to-date look at the development and promotion of wool see story on page 5.

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Just-sheared sheep are herded toward a dipping tank on La Juanita, a large estancia in the Province of Buenos Aires in Argentina. Dipping helps eliminate ticks, fleas, and other sheep pests.

Poor Prices Plus Production Hit World's Wool

lus Large Hit Hard at ool Industries

By SUZANNE K. WRIGHT
Livestock and Meat Products Division
Foreign Agricultural Service

The big wool producers of the Southern Hemisphere (Australia, New Zealand, South Africa, Argentina, and Uruguay) hoped the 1969-70 wool-marketing season would bring an improvement in prices. These had discouragingly crept downward for the last 20 years because of larger wool production combined with increased competition from manmade fibers. The change they got in price trends was from a skid to a plummet.

In New Zealand, the world's second largest wool exporter, prices averaged 8.7 percent lower than during the 1968-69 season; in South Africa they fell 12.7 percent; and in Australia, the world's leading wool seller, they tumbled 16 percent and were the lowest since 1947-48. Only Argentina did moderately well because of the improved quality of wool offered for sale.

The low prices for wool resulted primarily from lessened wool textile activity in some major importing countries coupled with a record world production of 6.2 billion pounds of wool, greasy basis. Further, severe droughts in New Zealand and South Africa greatly decreased available nourishment for sheep with an adverse effect on wool length and quality. In these two countries wools were of lower grade, and therefore lower priced, than in most years.

Another of the reasons, however, for the sharp price declines of the 1969-70 wool marketing year was the drop in prices of fine, or Merino, wools, which are normally the most valuable. This was a continuation of a new trend with the previous greatest downward price pressure during this decade on the coarse and medium wools from unimproved sheep and sheep crossbred with Merino.

Fine, or Merino, wools are generally used in apparel fabrics (women's and men's suitings, coat cloth, dress fabrics) and yarns for hand knitting. Australia and South Africa raise and export most of the world's Merino wool. In the 1969-70 marketing year, the very fine wools from Australia had the greatest price drop of all categories.

In contrast, medium and coarser wools either had moderate price drops or held steady for the year. Such wools were in relatively greater demand for making purewool blankets and wool-manmade blends for use in the manufacturing of carpets.

In general, the sluggish growth of wool use and low wool prices in the world's chief wool-importing countries —the industrial nations of the Northern Hemisphere such as the United Kingdom, members of the European Community (EC), Japan, and the United States—are due to the invasion of traditional wool markets by manmade fibers. Wool clothing must compete with an increasing variety of machine-washable, no-press garments made of artificial fibers. Also, the growth in the use of tufted carpets, which utilize mainly synthetic fibers, has severely restricted the market for woven wool carpets and has been identified as a major factor in the decline in prices of coarse and medium wools in past years.

In the wake of the discouraging 1969-70 wool marketing year, two of the biggest wool raisers—Australia and South Africa—adopted new measures to help their troubled wool industries. All major exporters spent money to aid and support sheep farming or wool marketing.

In early November 1970 Australia announced that wool growers suffering from the effects of low wool prices and drought could apply for financial assistance under the terms of the Government fund of US$33.6 million set aside for this purpose in the 1970 Australian budget. The upper limit of assistance to a wool grower is $1,680; and assistance is granted only if the amount for which a wool raiser is eligible is $56 or more.

In the same month the Australian Government established a Wool Commission, which was given the power to regulate wool marketing in Australia (see *Foreign Agriculture*, Dec. 14, 1970). Specifically, the Commission will operate a flexible reserve price system for all wool presented for sale and normally held suitable for resale. It will set and enforce standards of clip preparation for wool submitted for auction and for wool sold outside the auction system. And if a class of wool is being neglected at auction, the Commission has the power to sell that class of wool outside the auction system or have it processed.

A student technician examines the fleece from a Merino sheep in a practical course in wool grading in New South Wales, one of the chief sheep-raising States in Australia. Wool classification is an important part of preparing wool for sale.

In the Commission's operation of the flexible price reserve system, it has the power to buy and sell wool at its own discretion. In this way the Commission can dispose of stocks, give special attention to "neglected" wools, and support wool prices.

Financial backing for the Wool Commission is provided by the Australian Commonwealth Government.

During July 1970 the South African Wool Commission adopted a deficiency payment scheme for wool that replaced the former reserve price system in effect since 1958. The deficiency payment scheme means that wool can be sold below the target reserve price of 39 cents per pound, greasy basis, but that the Wool Commission makes up any shortfall by a supplementary payment to the grower. The deficiency payment level is flexible and is adjusted at the Commission's discretion in accordance with market movements.

It has been estimated that the Wool Commission will spend between $7 million and $10.5 million to stabilize the price of wool in South Africa during the 1970-71 season. It has already acquired large quantities of wool that otherwise would have been marketed for lower prices.

Another potential aid to the South African sheep farmer is the Government's stock reduction plan whereby sheepmen in overgrazed areas are paid compensation for reducing their flocks. After a farmer has reduced his flock on his own to the carrying capacity of his farm, he is paid a yearly subsidy to further reduce his sheep numbers by one-third.

New Zealand continued its deficiency payment arrangements for wool. In the New Zealand scheme, if the market fails to reach an appropriate minimum price (raised to 23.5 cents per pound, ex-store, for the 12 months beginning Sept. 15, 1970), the New Zealand Wool Commission can either pay a grower selling wool a supplement up to the minimum price or buy the wool itself. Purchases are made at prices up to but not exceeding the minimum or floor price, and the Commission pays the grower as a supplement any difference between the purchase price and the minimum price.

Stocks acquired in this way in New Zealand during the 1969-70 wool marketing year, when the minimum price was lower than for the 1970-71 season, were sold later at a net loss of approximately $1.2 million for 130,-169 bales.

In Argentina a reduction in export taxes on wool shipped before May 31, 1971, is designed to give more profit to wool raisers. The new export taxes are 12.5 percent of the wool index prices, greasy basis, and 6.5 percent, clean basis. Special assistance was given to wool from the Patagonian area by reducing export taxes to 10 percent, greasy basis, and 4 percent for clean wool. In addition, carded and combed wools (that is, semiprocessed) are free of tax at all ports. The old export tax rates were 21 percent of the index price for greasy (uncleaned) wool, 15 percent for clean, and 10 percnt for carded or combed wools.

Uruguay initiated no new policies to help sheep raisers but did continue some already active under the Sheep Improvement Commission. Technicians help farmers cull flocks and teach wool grading to rural youths. In addition, personnel of the Pasture Improvement Plan Commission show farmers how to increase the yield of feed from permanent pasture areas through reseeding, fertilizing, and rotation.

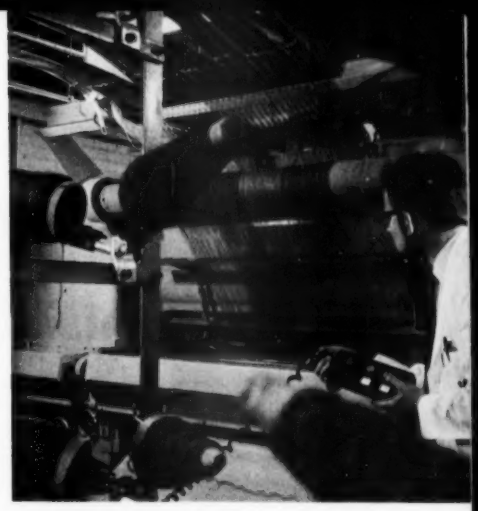
But aid to sheep farmers will not change the outlook for world wool prices, which are expected to continue downward throughout the current decade for several reasons.

First, the trend toward greater utilization of synthetic fibers will probably continue and may even increase as many countries expand their use of easy-care fabrics. Between 1968 and 1969 alone, the actual increase in synthetic fiber production for apparel use was well over one-third of total world wool apparel consumption, clean basis.

Second, even though prices are extremely low, farmers will probably continue to produce large quantities of wool and may even expand production in an effort to increase their incomes through quantity sales at low profits. In large areas of Australia raising sheep for wool is the only feasible agricultural pursuit at present. In other areas of Australia and New Zealand where dual-purpose (crossbred) sheep are raised and fattened for meat, increased demand for lamb will cause an accompanying rise in wool production from animals raised chiefly for slaughter.

The only plus factors in the otherwise bleak world wool situation are the success of wool promotion activities in several areas of the world, some new developments in processing wool used in garments (see story on page 5 of this issue), and the expected continued expansion of the wool market in Japan and most of the Common Market countries of Europe.

Sheep shearer in action in New Zealand near Hawkes Bay using an electric clipper head attached by jointed metal tubing to a power source. This sheep got sheared in 1 minute, 7 seconds.



PURE WOOL

The Woolmark label is your assurance of quality-tested products made of the world's best . . . Pure Wool

Now sporting the Woolmark—machine washable wool, above, and rugs from machine at right.

WOOL — Target for Promotion and Development

Where is the wool industry today?

In terms of technical advances it is making giant strides and catching consumer interest via inventive advertising promotions.

However, wool's position in the market is not as vigorous. In 1969 wool accounted for 7.5 percent of world fiber consumption, cotton 52.6, manmades 36.8, and silk and flax 4.1 percent. Although wool's percentage of the market fell from around 10 percent in 1960 to the present 7.5 percent, volume rose slightly from 1,541,000 metric tons to 1,657,000 metric tons.

But wool is by no means a dying fiber. In fact its future looks bright and wool is entering many new doors, including those of washing machines.

The International Wool Secretariat (IWS), which is supported by 200,000 woolgrowers in partner countries, Australia, New Zealand, South Africa, and Uruguay, is working to strengthen wool's position in the market through promotion, research, and development activities.

IWS has branches in 28 textile-manufacturing countries (including the Wool Bureau in the United States) and technical personnel and facilities in 19 of the countries. Because two-thirds of the partner countries' wool is used in the European market, the world headquarters, Wool House, is located in London, and the world technical center in Ilkley, England.

One of IWS' most effective campaigns is the Woolmark. From Piccadilly Circus to Times Square the skein-ish-shaped symbol is familiar to millions. Its appearance on a garment or other article alerts consumers to the fact that the item is a quality-tested product of pure wool.

Since its introduction in 1964 the Woolmark has spread to 35 countries including Poland, Israel, Iran, Turkey, and Yugoslavia and is now utilized by 11,000 licensees.

To qualify for the right to use the Woolmark, manufacturers must meet certain standards established by IWS and set up quality controls within their own plants. Samples of merchandise from each licensed manufacturer are periodically inspected and tested at IWS laboratories. Individual specifications vary according to the product, and tests include evaluation of such properties as tensile strength, colorfastness, mothproofing, and washability.

In line with technological advances in the wool industry, the Woolmark is cropping up on a variety of different items. Among them are members of a new family of wool products called Programmed Knits—wool knit garments which can withstand vigorous machine washing and tumble drying.

These Programmed wools as well as other wool articles are currently being promoted under the theme "Wool. It's got life." A unique carpet promotion campaign termed "Surround" uses the back-to-nature approach. "Surround" was introduced in November 1970 to promote carpets at the retail level.

Until now only items made of pure wool have been promoted by IWS and its branches. However, IWS recently announced that it will soon begin a limited promotional support of textile blends made of wool and a small amount of synthetic material.

Some of the recent technological developments in processing and products, such as the new shrinkproofing process for wool, called IWS Superwash, were initiated at IWS-sponsored research facilities around the world and have been further developed at the main technical center in Ilkley. At the present time a flammability project is being supported at the Textile Research Institute at Princeton, New Jersey.

The main emphasis at the Ilkley plant, which opened in 1968, is on developing new uses for wool and converting the result of wool textile research into viable industrial processes which will improve the performance of traditional wool products, and reduce the cost of manufacturing them.

At the appropriate stage in their development at Ilkley, projects are brought to IWS branch countries, where industrial evaluation programs are developed to meet the specific technical and marketing conditions of that particular branch country.

Water Vital To Tunisian Agriculture

By DUDLEY G. WILLIAMS
U.S. Agricultural Attaché
Morocco

Water is a scarce commodity for most Tunisians.

Tunisia, granary of the Roman Empire 2000 years ago, is again struggling toward self-sufficiency in wheat production, but the outlook for the once profitable citrus export industry is bleak. The basis for these far-reaching developments is, to a large degree, the influence, or lack, of water.

Use of higher yielding wheat varieties under the wheat improvement program and some wider use of irrigation is already paying off for Tunisia. Production from improved varieties in 1970 reached an estimated 120,000 metric tons from about 128,000 acres. Of this output, 60,000 tons, or 10 percent of local bread-wheat requirements, entered commercial consumption channels. The remainder was set aside for seed requirements of the expanding wheat production program.

Tunisia is hoping to make continued progress toward its ultimate objective of about 740,000 acres under improved varieties by 1973 and self-sufficiency in bread-wheat at the present level of consumption of about 600,000 tons annually, in years of average or better growing conditions. Increased output levels, however, can be reached consistently from year to year only through wider and more effective use of irrigation.

In contrast to grain, citrus production has suffered increasingly in recent years from the declining water table in the Cap Bon region, where essentially all commercial production for export is undertaken. Citrus exports, consisting largely of Tunisian Maltese oranges, declined in recent years from a maximum of about 50,000 tons to 25,000 tons in 1969-70.

Although some shift in citrus production to other areas of the country may be possible, slight locational changes could have adverse effects on the quality of Maltese oranges, owing to climatic differences. Because this quality variety has been established in Europe, particularly on the French market, local producers feel that only by sticking with it can they compete with the giant Mediterranean producers for European markets. For this reason, most seem to feel that diversion of water to the existing producing area is the only alternative available for rescuing the ailing citrus industry, but the cost would be substantial and in some instances could be prohibitive.

Thus, the centuries-old concern of Tunisians about the uncertain availability of water continues to be a major preoccupation today. The 1969-72 phase of the Tunisian Development Plan provides for a total investment equivalent to $120 million, of which $20 million is earmarked for agricultural development. Nearly 40 percent of the planned agricultural expenditure is slated for the expansion of irrigation capabilities through dams, wells, and water diversion projects. The goal is to expand the present irrigated area of about 220,000 acres to 346,000 by the end of 1972. While these objectives reflect the emphasis placed on water by the Tunisian Government, their fulfillment is by no means certain. In fact, completion on schedule of all current water projects would still leave a vast irrigation need if production uncertainties are to be reduced significantly.

Tunisia's export trade, however, is plagued by other problems in addition to the production limitations imposed by scarce water.

Tunisia now has preferential duty access on orange exports to other EC member countries, but has lost complete duty-free access to France. Since France takes almost all of Tunisia's oranges, the short-term benefits of the EC accord are reduced.

While some immediate benefit from the accord is expected for Tunisian olive oil in years of heavy production, wide cyclical swings in olive production reduce the export importance of oil in many years.

Because of these problems, Tunisians are looking beyond this first phase of EC association to a broader agreement covering a multitude of agricultural and industrial products, with immediate interest centering on fresh vegetables, wine, and, to some degree, processed vegetables. To benefit from any extended preferences on agricultural products, however, Tunisia must assure EC customers of adequate and continuing supplies, and it remains to be seen if current irrigation efforts will provide enough water for such assurance. If so, the dramatic influence of water on grain and citrus production prospects today will extend to other commodities.

U.S. Poultry Sales Helped By Tourism In Carribbean

By NORMAN G. PAULHUS
Dairy and Poultry Division
Foreign Agricultural Service

The Caribbean area is a growing market for U.S. poultry—and, though not an easy market to supply or service, offers real potential for U.S. exporters.

Poultry meat exports to the area consisting of Haiti, Jamaica, the Leeward and Windward Islands, the Netherlands Antilles, Barbados, Trinidad, the Dominican Republic, and the French West Indies—plus Surinam, the Bahamas, and Bermuda, which are technically not in the Caribbean region—have risen appreciably in the past year. With tourism shooting adrenalin into the economic life of the farflung islands, these shipments should go even higher in the future.

On the basis of shipments for the first 11 months of 1970, it appears that total volume was about 35.7 million pounds, compared with 30.3 million pounds the previous year. Value for 1970 was expected to approach $8.3 million; in 1969 it was $7.1 million.

Chicken meat exports for all of 1969 were up from 12 million pounds in 1960. Value also increased during the 1960-69 decade, from $3.8 million to $7.1 million. Combined 1969 volume shipped to the scattered Caribbean area exceeded the volume of poultry shipped to any other single export market.

In terms of value, 1969 shipments to the Leeward and Windward Islands, the Netherlands Antilles, the Bahamas, and Jamaica each exceeded the million-dollar mark. At least two other islands are approaching this volume of trade and might have passed the mark in 1970.

There is room in the area for additional growth, and the boom in tourism will be a great help to U.S poultry exporters. Tourist surveys reveal that most visitors come from North America —predominantly from the United States. However, increasing numbers are arriving from the West Indies, South America, and Europe.

A 1970 study of tourism in the Eastern Caribbean projects that 1.7 million tourists will visit the area annually by 1977, a 500-percent increase since 1967. (Other areas of the Caribbean will also attract large numbers of tourists.) In addition, it is projected that these visitors will spend an estimated $260 million compared with $50 million a decade earlier.

It becomes evident that this projected growth will require additional tourist accommodations, improved airline transportation facilities, better port capabilities, and a vast array of sophisticated food items for hotels and restaurants.

Rates of tourist growth vary among the several islands but it is generally agreed that tourist food requirements for most of these islands cannot be met by local production. Therefore, it will be necessary to import a variety of grocery, produce, frozen food, meat, and poultry items.

The Caribbean marketing area is a challenge to U.S. poultry exporters. Although there is a demand for a wide variety of poultry meats, the islands are scattered over a wide area and total requirements of some importers will be relatively small in volume. There are other importers, however, whose orders will be large enough to make trailer-load shipments possible.

The development of containerized shipping, including the use of 20 foot containers, should minimize product and package damage, reduce pilferage, and permit door-to-door delivery from supplier to importer.

Poultry-product lines purchased to supply area consumers, hotels, and restaurants are many and varied. In 1969, shipments of chicken parts to the Caribbean market totaled 22.1 million pounds, or 73.1 percent of the total. Other items ranged downward from broilers and fryers (3.7 million lb., 12.3 percent), whole turkeys (1.7 million lb., 5.6 percent), turkey parts (748,000 lb., 2.4 percent), and fowl (612,000 lb., 2 percent).

Other categories—poultry specialties, poultry livers, small game, and poultry items not classified elsewhere—totaled 1.3 million pounds and collectively amounted to slightly more than 4 percent of the total.

Each island market requires separate analysis to determine consumer and hotel needs on a seasonal basis.

Chicken parts are sold in both small stores and in major supermarkets. Lower priced parts sell in greatest volume, but in certain neighborhoods whole legs and drumsticks sell well.

In addition, there are restrictions which limit the importation of some specific poultry items in some markets, particularly broilers in Trinidad, Barbados, and Jamaica. There are, however, excellent opportunities to sell other poultry products and specialties which are not produced locally, but which are needed to service hotels and restaurants serving the tourist trade.

Supermarket development in the Caribbean is in its infancy when compared with that of the United States. However, some of the area's newer supermarkets—although not as large as some in the United States which display several thousand items—have a fairly wide variety of U.S. food products on their shelves. Refrigeration is limited, but some supermarkets devote as much as 10 or 15 feet of continuous refrigerated showcase space to poultry products.

For example, a leading supermarket in a prosperous neighborhood may display the following items in its cases: 5-pound cartons of chicken breasts, thighs, drumsticks, whole legs, necks and stripped necks and backs; tray-packed wings and thighs; Cornish game hens; whole Grade A turkeys; roasters; and ducklings. A smaller shop will have less variety.

Turkeys are highly seasonal at the consumer level and small birds from 8 to 12 pounds are generally preferred, but a wider variety of processed turkey items are required for hotels and restaurants, some of which have U.S. turkey on the menu the year round. Many hotel chefs are Europeans and are not familiar with the wide variety of turkey rolls, roasts, whole breasts, turkey parts, and diced turkey available from

(Continued on page 11)

Central American Meat Supplies and Exports

By ROGER S. LOWEN
Livestock and Meat Products Division
Foreign Agricultural Service

Several Central American and Caribbean countries are caught between the horns of a cattle dilemma—whether to keep their meat output for their own rapidly growing populations or whether to export as much as they can to earn the foreign exchange needed to pay for developmental investments. A dynamic export sector can provide the impetus necessary for sustained economic development; but adequate protein consumption is required for the human development that must accompany economic development.

Another factor is that diversification of exports has long been a major goal of these countries, and meat exports, although small compared with those of the major world exporters, are an important alternative commodity in an area heavily dependent on crops such as coffee, cotton, sugar, and bananas.

On the other hand, meat exports have few high-profit markets (chiefly the United States). Further, the United States has quantity limitations on meat imports.

Guatemala, Honduras, Nicaragua, Costa Rica, and Panama are the Central American countries that are at present meat exporters. And El Salvador and British Honduras have applied for review of their meat inspection systems as candidates for selling meat to the United States. In the Caribbean, Haiti and the Dominican Republic, which share the island of Hispaniola, are meat shippers.

Many Central American and Caribbean countries have long histories of cattle raising, though meat production has usually played a relatively minor role in national agricultures. Traditionally, cattle were concentrated on lands of low natural fertility in regions subject to a prolonged dry season and were left to fend for themselves. No attempt was made to control breeding. A type of animal evolved called the "criollo." Criollo cattle are fairly well adapted to semitropical conditions but are also small, slender, slow to mature, and of low meat productivity.

In recent years, however, several Central American and Caribbean countries have paid more attention to their livestock industries. These nations have sought to bolster their economies by encouraging increased production of meat and other food and development of new export commodities.

Livestock industries received aid from private capital, foreign governments, and international lending agencies.

But despite the increased interest, meat production has only barely been able to keep pace with population growth. Between 1960 and 1969 the population of Central America plus Hispaniola rose 32 percent to 21.7 million persons; cattle numbers increased only 30 percent to 9.2 million.

This sluggishness of advance has had several causes. Traditional livestock management methods have been continued in large areas and have resulted in low calving percentages (effectively under 50 percent) and high mortality rates among adult stock (over 10 percent). Although concerted attempts have been made to upgrade cattle herds

Far left, unloading U.S. Brahman breeding cattle in Honduras. Near left, herd of Brahman cows and calves in corral in Nicaragua. (Photos: Inter-American Bank.)

with imported purebred stock, the majority of the cattle are still of the criollo type. (In 1969 about 1800 head of cattle for breeding purposes were imported to Central America from the United States alone and about 800 head to the Dominican Republic. About half the imported stock were beef animals, of which the majority were Brahman.) And finally, governments and private credit institutions in various countries have not provided all the assistance required.

Domestic problems are not the only ones. Export problems also exist, such as limited markets. At present the chief meat market is the United States, which in 1970 had a voluntary restraint program in which the Central American republics, Haiti, and the Dominican Republic were assigned a total of 135.2 million pounds for meat shipments. The meats covered by the voluntary restraint program are those subject to the U.S. Meat Import Law (P.L. 88-482). They include fresh, chilled, and frozen beef, goat meat, and mutton. In practice, nearly all the meat shipped to the United States has been boneless beef used for manufacturing purposes.

Portions of the total quota are negotiated with each country on the basis of its traditional share of the market. In 1970 Nicaragua had a commitment of 41 million pounds; Costa Rica, 36.3 million; Guatemala, 23.2 million; Honduras, 15.3 million; the Dominican Republic, 11.5 million; Panama, 5.6 million; and Haiti, 2.3 million.

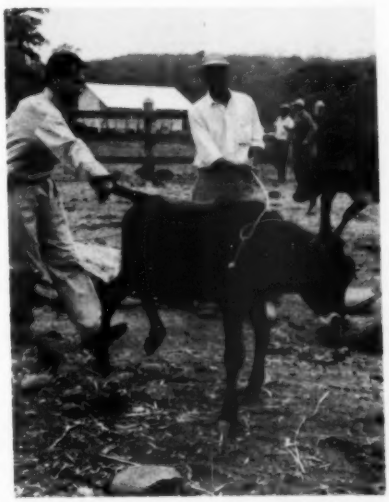
While there have been occasional requests to the United States for larger amounts under the restaint program for certain countries, there have also been occasional beef export embargoes by Central American and Caribbean countries to counteract domestic shortages of beef.

In an effort to find new markets for Central American and Caribbean beef, a Central American meat trade mission traveled to Europe and to Israel in 1970. The mission was sponsored by Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Panama, and the United States. A number of potential markets were examined, and Central American and Caribbean export meat sanitary standards were generally viewed as meeting European requirements. But the American exporters would have to meet the lower prices of Europe's traditional meat suppliers or develop a specialty trade before substantial market diversification to Europe could be achieved.

But if wider markets were available, it is questionable whether Central American and Caribbean meat exporters could supply them without further decreasing domestic beef consumption.

During the period from 1960 to 1969, when U.S. imports of beef and veal from Central America, Haiti, and the Dominican Republic rose from 34.5 million pounds to 136.1 million, already low per capita consumption declined even further. In 1969, per capita consumption of beef and veal was down to 30 pounds in Nicaragua, 22 in Costa Rica, 18 in Guatemala, and 9 in Honduras. In comparison, consumption for the same year in the United States was 114 pounds per person.

Since it is likely, according to recent estimates, that the livestock industries of the countries involved will continue to expand at a rate no faster than population growth, stepped-up exports could only mean still smaller supplies of protein for use by Central American and Caribbean populations.



Right, catching a criollo calf in Honduras; below, criollo stock in Costa Rica. (FAO photos.)

U.S. "Action" Exhibits Enliven Thailand's Chiang Mai Winter Trade Fair

. . . the art of sandwich making

Three action-packed U.S. exhibits, accompanied by the whir of sewing machines, appreciative smiles of sandwich samplers, and intermittent bellows from an expatriate bull, helped to transform Thailand's Chiang Mai Winter Fair into an exciting international exhibition.

From December 30 to January 6 a record crowd of nearly 1 million, including residents of Thailand's 13 northern Provinces, visitors from Bangkok, and foreign tourists, were drawn to wheat, cotton, and Santa Gertrudis cattle exhibits sponsored by USDA and cooperators.

Thailand, whose agricultural imports in 1969 totaled some $100.3 million ($31.9 million from the United States), is becoming an increasingly competitive market as exporters from many nations devote more and more time and funds to promotion of their products. In addition to the United States, Japan also had a pavilion at the Chiang Mai Fair, and a host of other exporting countries including Australia, New Zealand, and Italy sent representatives.

At the U.S. cotton exhibit, sponsored by the Cotton Council International in cooperation with the Thai Textile Manufacturing Association, visitors were intrigued by a "cut and sew" show. Colorful materials made from U.S. cotton and donated by member companies of the Thai Textile Manufacturing Association were clipped, slipped in sewing machines, and stitched into a variety of garments which were fitted and presented as gifts to passers-by. Design Thai, a member of the Thai Textile Manufacturing Association, held a continuous fashion show of cotton dresses on a raised platform which wound through the exhibit and outside the pavilion. The cotton exhibit also featured a series of pictures which enabled spectators to see the amount of wearing apparel one bale of U.S. cotton would produce.

. . . beefing up Thai livestock

The sandwich, a Western favorite virtually unknown in Thailand, was the focus of the wheat exhibit, sponsored by Wheat Associates (WA) in cooperation with local Thai millers and flour importers. Discussing the convenience, variety, flavor, economy, and nutritional advantages of sandwiches, demonstrators packed bread and rolls which had been prepared by WA-trained local bakers with fillings donated by U.S. companies and geared to Thai tastes. Recipes for eight sandwiches were translated into Thai and distributed to the throngs of sandwich samplers.

Per capita consumption of flour is only 3 pounds per person in Thailand, owing largely to rice-eating traditions and high prices stemming from steep import duties. However, expanding domestic flour production is expected to lower internal costs and help boost consumption.

Three Santa Gertrudis animals—two females and one bull—had the center ring at the livestock exhibit, sponsored by the Santa Gertrudis Breeders Association. The cattle were part of a shipment of U.S. purebred beef cattle purchased in late 1969 by Chokchai Bulakul, owner of the first large-scale beef cattle operation in Thailand. Mr. Chokchai answered questions from prospective importers and discussed how his animals were increasing beef production for both domestic consumption and export—a trend which is being actively encouraged by the Government of Thailand.

To round off the U.S. agricultural exhibits, exiting visitors were invited to view six films, two each on wheat, cotton, and Santa Gertrudis cattle.

—Based on report by
WILLIAM VON SEGGERN
U.S. Agricultural Attaché, Bangkok

. . . cotton from fashion to film

U.S. Poultry Exports Helped by Tourism In Caribbean Region

(Continued from page 7)

U.S. suppliers. Efforts have been made, however, to familiarize these chefs with the complete line of turkey items available from the United States.

Surface shipping in the Caribbean is being improved and the present decade will see numerous changes. Trade sources report there are at least twice as many steamship companies operating in the area as there were some 10 years ago.

During 1970, regular weekly container-ship service to Trinidad, Curaçao, and Haiti was announced. Although there had been some container movements to these ports, the new specialized service is a significant step in generating increased container traffic.

Caribbean islands with improved port facilities have been able to capitalize on the latest shipping developments. On the smaller islands import traders are required to operate either from old-fashioned piers, or by lighter systems in ports which lack sufficient depth to accommodate the larger ships.

Almost every port along the Atlantic seacoast of the United States has seen growth in its trade southward to the Caribbean and Latin America, but expansion of this trade has been especially noticeable in Florida ports, particularly at Miami and Port Everglades. Both have benefited from development of roll-on, roll-off techniques.

Despite increased container service, trade sources report that the Caribbean area still is not ready for an all-out rapid introduction of containers—either vans or trailers. Cargo handling equipment is lacking, roads are inadequate, port areas do not have backup space, congestion is often a transportation nightmare, and refrigeration facilities are in short supply.

Some of the smaller islands are caught in a squeeze. They are unable to handle containerized or trailerized shipments, yet they are under relentless pressure to do so. It will be difficult, if not impossible, for them to resist this pressure being exerted by such export areas as the United States and Europe.

Increasing demand for sophisticated gourmet foods in Caribbean tourist centers has made for greater dependency on air cargo shipments. Many major food importers utilize weekly air cargo shipments, in metric ton lots, to meet their requirements for high-cost, highly perishable products.

Some difficulties are experienced in scheduling cargo space and in meeting flights with refrigerated trucks. Importers sometimes report cutbacks in shipments because of inadequate cargo space, especially during the season when tourist traffic is heaviest.

Projected increases in tourist traffic in this decade will undoubtedly lead to introduction of flights by larger jet aircraft to several Caribbean distribution centers. It is anticipated that this in turn will result in better space availability and better service to meet a growing requirement for perishables.

Various means have been used to promote the sale of U.S. poultry meat products in the Caribbean area. Among these have been food shows and demonstrations.

Food shows were first scheduled at Curaçao, Barbados, and Trinidad in 1968. Held in cooperation with USDA, these shows featured booths at which turkey products and specialty poultry items were displayed in refrigerated cases. Demonstrators were on hand to discuss the various products, their availability, and prices.

This promotional effort was successful in introducing new poultry products and in showing chefs and food buyers the potential for using a variety of poultry products on their menus. The distribution of poultry samples to interested buyers resulted in trial shipments which in turn led to repeat orders for a number of items.

The following year turkey demonstrations were held in Jamaica, Antigua, Curaçao, Barbados, and Trinidad. Invited guests were chefs and food buyers from the hotel and restaurant trade, importers and agents, Government officials, and the press.

Further promotional activities are tentatively planned in 1971 in several Caribbean locations, and U.S. poultry exporters might well investigate the possibility of participating in some of these events.

POULTRY MEAT EXPORTS TO CARIBBEAN AREA[1]

Classification	1966		1967		1968		1969		1970[2]	
	Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value
	Mil. lb.	*Mil. dol.*	*Mil. lb.*	*Mil. dol.*	*Mil. lb.*	*Mil. dol.*	*Mil. lb.*	*Mil. dol.*	*Mil. lb.*	*Mil. dol.*
Young chicken	15.2	3.5	18.2	4.1	22.9	4.4	26.0	5.4	32.8	6.8
Whole fowl	1.8	.3	.5	.1	.4	.1	.6	.2	.3	.1
Whole turkey	1.9	.8	1.8	.7	2.1	.7	1.7	.7	1.3	.7
Turkey parts[3]	—	—	.4	.2	.7	.3	.7	.3	.4	.2
Poultry, n.e.c.[4]	.8	.3	1.3	.4	2.2	.6	1.0	.4	.5	.3
Small game[5]	(6)	(7)	(6)	(7)	(6)	(7)	(6)	(7)	(6)	(7)
Poultry liver	(6)	(7)	(6)	(7)	(6)	(7)	(6)	(7)	(6)	(7)
Poultry specialties	.1	.1	.2	.1	.2	.1	.3	.1	.4	.2
Total[8]	19.8	5.0	22.4	5.6	28.5	6.2	30.3	7.1	35.7	8.3

[1] See article for listing of countries. [2] Estimated. [3] Included with whole turkey prior to 1967. [4] Not elsewhere classified. [5] Included with poultry not elsewhere classified prior to 1965. [6] Less than 50,000 lb. [7] Less than $50,000. [8] Rounding of figures accounts for discrepancies in totals.

CROPS AND MARKETS

Grains, Feeds, Pulses, and Seeds

Weekly Rotterdam Grain Prices and Levies

Current offer prices for imported grain at Rotterdam, the Netherlands, compared with a week earlier and a year ago:

Item	Feb. 17	Change from previous week	A year ago
	Dol. per bu.	*Cents per bu.*	*Dol. per bu.*
Wheat:			
Canadian No. 2 Manitoba	1.98	−6	2.02
USSR SKS-14	2.03	0	(1)
Australian FAQ	1.88	0	1.75
U.S. No. 2 Dark Northern Spring:			
14 percent	2.07	−2	1.92
15 percent	2.09	−4	2.02
U.S. No. 2 Hard Winter:			
13.5 percent	1.98	−1	1.77
USSR-441 Yellow Winter	1.96	0	(1)
Argentine	(1)	(1)	1.75
U.S. No. 2 Soft Red Winter	1.89	0	1.65
Feedgrains:			
U.S. No. 3 Yellow corn	1.80	0	1.58
Argentine Plate corn	1.85	+1	1.53
U.S. No. 2 sorghum	1.63	−1	1.53
Argentine-Granifero sorghum	1.61	0	1.33
Soybeans:			
U.S. No. 2 Yellow	3.41	+3	2.97
EC import levies:			
Wheat	1.42	0	1.65
Corn [2]	.71	+2	.91
Sorghum [2]	.75	−4	1.04

[1] Not quoted. [2] Until Aug. 1, 1972, Italian levies are 19 cents a bu. under those of other EC countries.
Note: Basis—30- to 60-day delivery.

Fats, Oils, and Oilseeds

U.S. Oilcakes and Meals, December Exports

U.S. soybean meal exports in December, at 353,000 short tons, declined 14 percent or 58,200 tons from the 411,200 tons exported in December 1969. Because of the unusually high exports in November, however, total exports in October-December of 1.07 million tons remained virtually the same as the previous year's total for the same months.

The 752,500 tons of soybean meal shipped to the European Community, representing 70 percent of the total, declined 54,800 tons from exports through December 1969. Exports to the Netherlands, in particular, were down 60,000 tons and increases shown for Italy, France, and Belgium-Luxembourg were not sufficient to offset this decrease. Heavier shipments of soybean meal to other major markets including Yugoslavia, Hungary, Switzerland, and Ireland raised the October-December total to virtually the same level as exports in the first quarter of the previous marketing year.

Total cake and meal exports, at 1,126,300 tons, edged slightly ahead of exports in October-December 1969, owing to larger exports of "other cakes and meals."

U.S. EXPORTS OF CAKES AND MEALS

Item and country of destination	December		October-December	
	1969 [1]	1970 [1]	1969-70 [1]	1970-71 [1]
	1,000 short tons	*1,000 short tons*	*1,000 short tons*	*1,000 short tons*
Soybean:				
Belgium-Luxembourg	22.2	14.5	69.9	71.0
France	83.8	62.7	175.4	177.7
Germany, West	92.5	84.7	300.1	291.7
Italy	43.9	43.7	83.4	93.6
Netherlands	42.6	36.3	178.5	118.5
Total EC [2]	285.0	241.9	807.3	752.5
Canada	22.8	18.4	66.7	65.6
Yugoslavia	22.5	29.7	34.1	63.9
Poland	13.4	14.8	27.8	26.0
Hungary	14.9	13.6	14.9	25.2
Bulgaria	0	0	0	22.0
Switzerland	7.2	7.3	13.5	18.2
Ireland	0	0	6.7	13.0
Czechoslovakia	0	0	0	12.7
Philippines	5.2	0	14.5	10.2
Australia	4.1	3.9	9.2	9.0
Denmark	9.1	7.2	13.1	7.2
Portugal	2.7	4.9	2.7	7.0
Korea Rep.	.2	1.2	1.8	5.9
Trinidad	1.0	.4	1.8	5.1
United Kingdom	.1	2.4	4.0	5.1
Others	23.0	7.3	50.8	19.7
Total [2]	411.2	353.0	1,068.9	1,068.3
Cottonseed	.7	.1	1.6	.9
Linseed	4.6	8.4	44.8	36.1
Total cakes and meals [3]	418.8	369.1	1,125.5	1,126.3

[1] Preliminary. [2] Totals computed from unrounded data. [3] Includes peanut and small quantities of other cakes and meals. Bureau of the Census.

U.S. Edible Oils, December Exports

U.S. soybean oil exports in December soared to 190.8 million pounds, over 3 times the November exports of 58 million pounds and an increase of 75 percent or 81.7 million pounds from the December 1969 total. Exports through December reached 361.5 million pounds, exceeding the October-December 1969 total by 83.2 million pounds. Major recipients of US. soybean oil during the first quarter of this marketing year included Yugoslavia, Pakistan, Peru, India, Morocco, Chile, Israel, Iran, and Canada.

U.S. cottonseed oil exports in December increased to 36.9

million pounds from the comparatively low quantities in October and November—12.2 million and 19.3 million pounds, respectively. As compared with December 1969 shipments of 42.7 million pounds, cottonseed oil exports declined 14 percent or 5.8 million pounds. The October-December total of only 68.4 million pounds was less than half of the quantity shipped in the same months a year earlier. Over 90 percent of the cottonseed oil was exported to the European Community, Canada, Poland, the United Arab Republic, the United Kingdom, Venezuela, and Mexico.

U.S. EXPORTS OF EDIBLE OILS

Item and country of destination	December		October-December	
	1969 [1]	1970 [1]	1969-70 [1]	1970-71 [1]
	Mil. lb.	*Mil. lb.*	*Mil. lb.*	*Mil. lb.*
Soybean: [2]				
Yugoslavia	1.0	63.8	(3)	101.5
Pakistan	28.2	38.2	106.5	65.2
Peru	8.7	15.2	12.1	24.9
India	2.4	11.5	15.3	19.8
Morocco	(3)	7.6	2.2	19.4
Chile	11.5	10.8	13.4	19.3
Israel	5.3	2.2	16.4	18.0
Iran	1.9	4.8	1.9	13.0
Canada	2.2	3.0	7.1	10.8
South Vietnam	0	7.1	4.3	7.1
Haiti	2.1	2.3	4.3	6.6
Tunisia	21.5	5.9	43.7	6.1
Australia	0	2.3	1.6	6.0
Colombia	3.0	1.6	5.7	4.9
United Kingdom	4.0	4.6	4.1	4.7
China, Taiwan	0	0	0	4.4
Panama	1.1	(3)	1.4	3.8
Guinea	0	1.6	0	3.2
Ecuador	2.2	2.5	3.3	3.0
Others	14.0	5.8	35.0	19.8
Total [4]	109.1	190.8	278.3	361.5
Cottonseed: [2]				
Belgium-Luxembourg	0	(3)	0	(3)
France	0	(3)	(3)	(3)
Germany, W.	0	9.5	2.7	9.5
Italy	(3)	0	(3)	0
Netherlands	7.6	1.1	10.8	1.1
Total EC [4]	7.6	10.6	13.5	10.6
Canada	3.0	3.1	6.9	9.5
Poland	0	2.0	0	9.4
U.A.R.	0	4.4	22.0	9.1
United Kingdom	13.7	8.8	13.8	8.8
Venezuela	7.0	6.4	24.7	8.6
Mexico	.2	.2	2.8	6.9
Sweden	3.4	0	5.5	2.1
Iran	6.0	0	35.0	1.7
Japan	.1	1.1	1.9	1.1
Bahamas	.1	.2	.2	.3
Australia	0	.1	0	.1
Others	1.6	(3)	20.9	.2
Total [4]	42.7	36.9	147.2	68.4
Total oils	151.8	227.7	425.5	429.9

[1] Preliminary. [2] Includes shipments under P.L. 480 as reported by Census. [3] Less than 50,000 lb. [4] Total computed from unrounded data. Bureau of the Census.

U.S. Soybeans, December Exports

U.S. soybean exports in December totaled 46.9 million bushels—up 7 million bushels from exports in December 1969. The heavier December exports boosted the September-December total to 165.8 million bushels, an increase of 4 percent from the 159.5 million exported in the same period in 1969. Over 80 percent of the soybeans that were exported in December were destined for the European Community, Japan, Canada, and Spain.

U.S. EXPORTS OF SOYBEANS

Country of destination	December		September-December	
	1969 [1]	1970 [1]	1969-70 [1]	1970-71 [1]
	Mil. bu.	*Mil. bu.*	*Mil. bu.*	*Mil. bu.*
Belgium-Luxembourg	0.9	1.4	8.7	5.7
France	.1	1.6	.2	4.2
Germany, West	4.4	5.6	13.5	18.9
Italy	2.8	4.3	12.1	8.9
Netherlands	7.6	6.7	22.8	21.9
Total EC [2]	15.8	19.6	57.3	59.6
Japan	8.3	8.3	34.2	41.6
Canada	4.9	4.6	27.1	23.1
Spain	3.3	5.7	10.1	12.3
China, Taiwan	2.3	1.9	7.6	7.9
Denmark	1.1	1.6	7.2	7.7
Israel	1.7	1.1	5.0	3.0
United Kingdom	1.0	1.0	4.3	2.6
Norway	.6	.5	2.0	2.5
Poland	0	1.1	2.5	1.1
Others	.9	1.5	2.2	4.4
Total [2]	39.9	46.9	159.5	165.8
	Mil. lb.	*Mil. lb.*	*Mil. lb.*	*Mil. lb.*
Oil equivalent	438.0	514.5	1,751.1	1,820.1
	1,000 short tons	*1,000 short tons*	*1,000 short tons*	*1,000 short tons*
Meal equivalent	937.5	1,101.3	3,747.7	3,895.4

[1] Preliminary. [2] Totals computed from unrounded data. Bureau of the Census.

Philippine Coconut Exports Up

Philippine exports of coconut products (copra, coconut oil, and desiccated coconut) in calendar 1970 amounted to 642,200 long tons, 7.4 percent above the low 1969 volume. The bulk of the increase reflected a substantial gain in the last half of the year due to increased rainfall. Despite the typhoon damage late in 1970, further recovery in Philippine output and exports of coconut products is expected to occur during this year.

Philippine copra production, excluding consumption of food nuts, is estimated to have exceeded 1.2 million tons,

PHILIPPINE COCONUT TREE NUMBERS AND COPRA PRODUCTION

Calendar year	Estimated tree numbers		Estimated copra production [1]	Estimated copra production per bearing tree
	Total	Bearing		
	Millions	*Millions*	*1,000 long tons*	*Pounds*
1965	241	164	1,435	19.6
1966	245	165	1,600	21.7
1967	244	166	1,430	19.3
1968	252	167	1,336	17.9
1969	252	186	1,161	14.0
1970	264	207	1,225	13.3
1971 [2]	—	225	1,280	12.7

[1] Includes the copra equivalent of exports of copra, desiccated coconut, and copra meal as well as estimated domestic consumption of copra meal, but excludes quantities of mature and immature nuts used directly for food purposes. [2] FAS forecast.

copra basis, in 1970, 6 percent above the depressed 1969 volume. Although the aggregate average yield per tree may again decline in 1971 because of the typhoons late in 1970 and declining yield expectancy of older trees, additional coconut production from trees just coming into bearing together with the beneficial effects from increased rainfall should result in a continued recovery in production. Commercial production is preliminarily expected to approach 1.3 million tons in 1971. Most of the increase is expected to move into export channels.

The Philippine Government has been placing increased emphasis on further development of processing facilities. This emphasis is expected to bring about further expansion in the copra-crushing industry. Consequently copra exports as such in the future are expected to account for a smaller proportion of total production than formerly.

The United States has been the major market for Philippine exports of copra and coconut oil. U.S. imports on an oil basis in 1970 accounted for over 60 percent of Philippine exports of copra and coconut oil.

PHILIPPINE COCONUT PRODUCTS

Item	1967	1968	1969	1970
	1,000 long tons	*1,000 long tons*	*1,000 long tons*	*1,000 long tons*
Exports:				
Copra	818.6	654.0	549.0	413.4
Coconut oil	230.2	266.3	210.7	329.3
Desiccated coconut	58.9	72.8	49.5	58.0
Copra meal	181.1	184.0	175.0	237.7
Oil equivalent of copra:				
Production	915.1	855.2	743.1	784.1
Exports	803.2	745.4	603.3	642.2
Apparent consumption	111.9	109.8	139.8	141.9

Compiled from shipment data—Association of International Shipping Lines, Manila, and other sources.

Tobacco

U.S. Tobacco Imports Down, Consumption Up

General imports (arrivals) of unmanufactured tobacco into the United States during 1970 were down about 5 percent from the 1969 level and were off about 17 percent from the high level reached during 1967. Nearly 219 million pounds, valued at $111 million, were imported, compared with 231 million pounds, at $117 million, during 1969. In 1967 a total of 264 million pounds for about $162 million was imported. With the exception of cigarette leaf (flue and burley), imports of most major categories of leaf declined. Arrivals of flue and burley cigarette leaf increased about 4 million pounds, or were one-fourth more than in the previous year, and continued the significant expansion of the past few years.

The volume of arrivals for December was up over the relatively low volume for December 1969, but continued substantially lower than receipts for this month in recent years.

Stocks of foreign-grown tobacco held by manufacturers and dealers in the United States as of October 1970 remained at a relatively high level, representing about 2.3 years' usings, based on the current annual rate. Stocks of foreign-grown cigar leaf, at 99 million pounds, were at a record high level, and foreign-grown cigarette smoking tobacco stocks, at about 406 million pounds, were down about 10 percent from the record high level held July 1969.

Imports of unmanufactured tobacco leaf for consumption (duty-paid withdrawals from customs bond for manufacture) were about 219 million pounds, for a value of $128 million during calendar 1970. This represented an increase of about 4 percent in volume and a small increase in value from the 1969 level. However, 1970 consumption of imported tobacco was lower than the alltime high of 221 million pounds for $142 million in 1968.

Imports for consumption in December 1970, at 14.7 million pounds, were about the same as the 14 million to 15 million pounds during that month in the past 2 years.

U.S. IMPORTS OF UNMANUFACTURED TOBACCO
[For consumption]

Period and kind	1969 Quantity	1969 Value	1970 Quantity	1970 Value
	1,000 pounds	*1,000 dollars*	*1,000 pounds*	*1,000 dollars*
January-December:				
Cigarette leaf (flue & burley)	4,485	1,488	7,757	2,043
Cigarette leaf, other	143,327	96,862	141,795	94,834
Cigar wrapper	462	1,643	578	2,415
Mixed filler & wrapper	327	1,425	255	1,100
Cigar filler, unstemmed	2,325	2,115	3,035	2,533
Cigar filler, stemmed	2,457	3,176	2,627	3,429
Scrap	55,240	20,621	62,176	22,024
Stems	1,092	199	391	29
Total	209,715	127,529	218,614	128,407
December:				
Cigarette leaf (flue & burley)	162	52	0	0
Cigarette leaf, other	9,787	6,651	9,948	6,748
Cigar wrapper	19	72	20	65
Mixed filler & wrapper	10	47	20	90
Cigar filler, unstemmed	135	135	180	180
Cigar filler, stemmed	166	204	153	215
Scrap	4,136	1,442	4,353	1,473
Stems	0	0	0	0
Total	14,415	8,603	14,674	8,771

Bureau of the Census.

U.S. GENERAL IMPORTS OF UNMANUFACTURED TOBACCO

Period and kind	1969 Quantity	1969 Value	1970 Quantity	1970 Value
	1,000 pounds	*1,000 dollars*	*1,000 pounds*	*1,000 dollars*
January-December:				
Cigarette leaf (flue & burley)	14,456	5,044	18,342	5,850
Cigarette leaf, other	131,730	83,282	125,580	75,929
Cigar wrapper	586	1,903	614	2,433
Mixed filler & wrapper	571	2,254	1,066	2,530
Cigar filler, unstemmed	38,710	11,878	34,471	11,964
Cigar filler, stemmed	2,413	2,623	3,021	3,470
Scrap	41,049	9,664	35,423	8,528
Stems	1,052	24	273	22
Total	230,567	116,672	218,790	110,726
December:				
Cigarette leaf (flue & burley)	684	302	2,311	641
Cigarette leaf, other	6,132	4,273	12,022	6,304
Cigar wrapper	30	145	39	104
Mixed filler & wrapper	1	5	37	143
Cigar filler, unstemmed	3,200	981	2,069	789
Cigar filler, stemmed	166	182	207	284
Scrap	5,234	824	2,779	706
Stems	0	0	0	0
Total	15,447	6,712	19,464	8,971

Bureau of the Census.

Fruits, Nuts, and Vegetables

Hamburg Prices of Fruits, Juices

Quotations represent importers' selling prices, including duty and sugar-added levy, but excluding the value-added tax. Sales are in lots of 50-100 cases.

Type and quality	Size of can	Price per dozen units Jan. 1970	Oct. 1970	Jan. 1971	Origin
CANNED FRUIT		*U.S. dol.*	*U.S. dol.*	*U.S. dol.*	
Apricot halves:					
Choice	2½	—	3.80	3.80	U.S.
Do	2½	3.34	3.28	3.28	Spain
Choice, light syrup	2½	3.51	2.85	2.85	Greece
Peaches, halves:					
Choice	2½	3.97	—	4.48	U.S.
Choice, light syrup	2½	—	—	4.10	S. Africa
Not specified	2½	3.02	2.85	2.95	Greece
Pears:					
Heavy syrup	2½	4.00	3.87	3.87	Italy
Not specified	1	—	3.61	3.44	Mnld. China
Fruit cocktail:					
Heavy syrup	2½	5.84	5.57	5.57	U.S.
Do	303	—	3.64	3.64	U.S.
Do	2½	—	5.28	5.11	Australia
Not specified	2½	4.43	—	4.72	Italy
Cherries, red pitted:					
Fancy, water pack	10	23.77	20.16	20.98	U.S.
Not specified, water pack	3 kg.	23.93	18.52	17.21	Italy
Do	3 kg.	—	—	16.89	Netherlands
Pineapple, whole slices:					
Fancy	2½	5.64	5.25	5.25	U.S.
Choice	2½	4.79	4.77	4.77	U.S.
Do	30 kg.	3.61	3.87	3.80	Taiwan
Not specified	2½	3.80	3.77	3.77	Ivory Coast
Do	2½	3.51	3.51	3.38	S. Africa
Pineapple, crushed:					
Fancy	10	—	15.41	16.07	U.S.
Choice	10	9.67	8.36	8.36	S. Africa
CANNED JUICES					
Grapefruit, unsweetened	[1] 1 l.	—	4.13	3.70	Israel
Do	43 oz.	4.80	4.80	4.66	Israel
Do	43 oz.	—	3.74	3.48	Greece
Orange, unsweetened	[1] 1 l.	3.67	3.77	3.57	Israel
Do	43 oz.	3.57	3.41	3.25	Greece

[1] Packed in glass bottles.

Record Walnut Crop for India

India's 1970 commercial walnut crop is currently placed at 16,500 short tons (in-shell basis), 50 percent above last season's poor harvest. Favorable weather combined with nominal insect and disease damage to produce this record crop. Lower foreign prices have discouraged Indian exports, with 1970-71 season exports forecast at 7,500 tons.

Exports during the 1969-70 season reflected the poor 1969 harvest, totaling only 5,000 tons. This represented less than 45 percent of the 1968-69 total of 11,500 tons. Domestic consumption is expected to increase again this year, with 1970 utilization placed at 8,900 tons. Lower walnut prices, combined with the shortage (and corresponding high prices) of other comparable tree nuts, indicate that the domestic demand for walnuts will continue strong.

SUPPLY AND DISTRIBUTION OF INDIAN WALNUTS

Item	1968	1969	1970[1]
	1,000 short tons	*1,000 short tons*	*1,000 short tons*
Beginning stocks (Oct. 1)	0.2	0.1	0.1
Production	15.4	11.0	16.5
Total supply	15.6	11.1	16.6
Exports	11.5	5.0	7.5
Domestic disappearance	4.0	6.0	8.9
Ending stocks (Sept. 30)	.1	.1	.2
Total distribution	15.6	11.1	16.6

[1] Preliminary.

Yugoslav Dried Prune Estimate Revised

Yugoslav dried prune production is currently estimated at 20,000 short tons, 57 percent below the bumper 1969 crop of 46,000 tons, but moderately higher than early forecasts and approximating the 5-year 1964-68 average. Cool and rainy weather was prevalent during blossom, but weather was favorable throughout the remaining months of the growing season.

The recent devaluation of Yugoslav currency is expected to stimulate exports to Western European countries. Current-season exports are forecast at 17,000 tons, the same level as 1969-70. About three-fourths of the 1969-70 exports were shipped to Eastern European countries and one-fourth to Western countries. Major buyers were the Soviet Union, Poland, Czechoslovakia, Italy, West Germany, Austria, and the United Kingdom.

SUPPLY AND DISTRIBUTION OF YUGOSLAV PRUNES

Item	1967-68	1968-69	1969-70	1970-71[1]
	1,000 short tons	*1,000 short tons*	*1,000 short tons*	*1,000 short tons*
Beginning stocks (Oct. 1)	5.0	6.6	2.8	20.4
Production	25.2	14.1	46.0	20.0
Total supply	30.2	20.7	48.8	40.4
Exports	14.1	7.0	17.0	17.0
Domestic disappearance	9.5	10.9	11.4	12.4
Ending stocks (Sept. 30)	6.6	2.8	20.4	11.0
Total distribution	30.2	20.7	48.8	40.4

[1] Preliminary.

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Foreign Agriculture

U.K. Ministry of Agriculture Prunes Services

While agreeing that a wide variety of technical and marketing advisory services and financial assistances are desirable for the United Kingdom's farmers, the present British Government feels that private organizations (perhaps of farmers themselves) should do more and the Government less.

Putting ideas into action, U.K. Minister of Agriculture James Prior announced before the House of Commons in late January that several Government agricultural advisory services and forms of farm aid would be reduced or eliminated. Details of the changes were given in a white paper entitled "Proposed Changes in the Work of the Ministry of Agriculture, Fisheries and Food."

First, the white paper makes clear that in general the Ministry's regulatory functions, such as checking compositional standards, labeling, advertising, additives, and hygienic standards in production and handling of basic food products, will be continued. A few functions, however, are being considered for discontinuation.

Next, while nearly all present agricultural marketing boards will continue to function in the near future, one agency, the Agricultural Market Development Executive Committee, will cease to receive funds. And grants for marketing studies administered by the Committee will end on March 31, 1971.

Several changes in the support of improvement of farm enterprises have been made. Since January 1, 1971, various grants for capital improvements to farms have been unified and rationalized; and grants formerly given for agricultural plant and machinery have been eliminated in favor of a system of tax allowances.

In the future, financial aid to encourage cooperative enterprises will no longer include grants for working capital. And funds for helping the business efficiency and record keeping of farms will not be renewed after April 1972. Further, the Northern Pennines Rural Development Board is being terminated.

From March 1971 a new Agricultural Development and Advisory Service for England and Wales will unify the main professional, scientific, and technical services provided by the Ministry.

The new Service will concentrate on help to groups rather than individuals and will not duplicate information or aid available from other sources. Certain services, such as soil and fodder analyses, will be continued, but at a charge to the user. The Service's show and exhibition activities and publications will be streamlined. Assistance to farmers in testing agricultural machines will be discontinued as will advice on individual land use.

In addition, 58 county agricultural executive committees plus a number of subcommittees and district committees, amounting to over 300 bodies in all, are to be abolished and replaced with small regional panels.

Testing a forage harvester on an experimental farm in the United Kingdom.